

**STATE OF WISCONSIN  
DEPARTMENT OF EMPLOYEE TRUST FUNDS**

**WRS DISABILITY BENEFIT ANNUITY STATISTICAL REPORT  
2002: March-April-May**

This report provides a summary of disability information for the Board's review and approval. Department staff have reviewed and made the following recommendations on initial disability applications submitted by participants. Staff review individual participant applications on an ongoing basis to determine if disability benefits can continue. If you have questions or would like additional information regarding disability benefits, please contact Audrey Koehn at (608) 261-8173 or Peg Narloch at (608) 267-9035 or Peg.Narloch@etf.state.wi.us.

The following key can be used to describe the type of determination made by ETF Staff:

**Approved** – Disability applications that meet the service, medical and employer criteria required under §40.63 (1) and (4), Wis. Stats., are approved and processed for benefit payments.

**Cancelled** – Disability applications that are incomplete within one year after the Department receives the disability application are cancelled. Applications are considered incomplete if the Department has not received the required medical certification and/or employer statement.

**Deemed Approved** – Disability applications are deemed approved if the applicant meets the service requirement and the Department receives a valid disability application and one *Medical Report* certifying the applicant's disability prior to the applicant's death. The employer is also required to submit an Employer Statement.

**Denial** – Disability applications are denied if the applicant does not meet all of the statutory requirements (service, medical and employer statement).

**Denial Rescinded: Approved** – This determination is used for disability applications in situations where the application was initially denied because the applicant does not meet the statutory requirements and the denial has since been overturned and the application approved due to receipt of additional information or as determined by the appropriate Board.

**Termed** – Disability applications that were initially approved and benefit payments made may be terminated if the Department receives information from a physician certifying that the individual no longer meets the medical definition for a disability or the individual does not comply with requests for medical or financial information.

**Withdrawn** – This determination is used when disability applications are withdrawn at the request of the applicant. This occurs most often when an applicant returns to active employment and no longer meets the statutory requirements for a disability benefit.

**Exhibit B: WRS DISABILITY ANNUITIES**

DISABILITY BENEFITS				
	Mar. 2002	April 2002	May 2002	Total
Disability Estimates Requested	70	84	107	261
Disability Estimates Completed	62	106	105	273
<b>Disability Annuities Started (on payroll)</b>				
Teachers Retirement Board 40.63	6	9	21	36
Wisconsin Retirement Board 40.63	19	19	26	64
40.65 Duty Disability	1	2	2	5
<b>Total Annuities Started</b>	26	30	49	105

**TEACHER BOARD DISABILITY DETERMINATIONS**

<b>TEACHER BOARD DISABILITY DETERMINATIONS</b>				
<b><u>Type of Determination</u></b>	<b>Mar. 2002</b>	<b>April 2002</b>	<b>May 2002</b>	<b>Total</b>
Cancelled	0	1	0	1
Deemed Approved	1	2	3	6
Denial	0	0	0	0
Denial Rescinded: Approved	0	0	0	0
Termed	0	0	1	1
Withdrawn	1	1	3	5

<b>TEACHER BOARD DISABILITY ANNUITIES STARTED BY OPTION SELECTED</b>				
<b><u>Option</u></b>	<b>Mar. 2002</b>	<b>April 2002</b>	<b>May 2002</b>	<b>Total</b>
12 100% Continued to Named Survivor (Jt. Survivor) with 180 Payments Guaranteed	2	4	7	13
17 Prior to 1/1/82 with Spouse or Minor/Dependent Child	1	0	2	3
24 For Annuitant's Life Only	1	1	4	6
25 Life Annuity with 180 Payments Guaranteed	1	2	3	6
26 75% Continued to Named Survivor (Jt. Survivor)	0	0	0	0
27 100% Continued to Named Survivor (Jt. Survivor)	1	2	3	6
28 75% Continued to Annuitant or Named Survivor (Jt. Survivor) Upon Death of Either	0	0	2	2
<b>TOTAL</b>	<b>6</b>	<b>9</b>	<b>21</b>	<b>36</b>

<b>TEACHER BOARD DISABILITY ANNUITIES STARTED BY GENDER</b>				
	<b>Mar. 2002</b>	<b>April 2002</b>	<b>May 2002</b>	<b>Total</b>
<b><u>40.63 Disability Benefits by Gender</u></b>				
Females	5	6	15	26
Males	1	3	6	10
<b>TOTAL</b>	<b>6</b>	<b>9</b>	<b>21</b>	<b>36</b>

<b>TEACHER BOARD DISABILITY APPLICATIONS SUBMITTED BY AGE</b>				
	<b>Mar. 2002</b>	<b>April 2002</b>	<b>May 2002</b>	<b>Total</b>
<b><u>40.63 Disability Benefits by Age</u></b>				
31-35	0	0	1	1
36-40	0	1	0	1
41-45	1	1	2	4
46-50	0	5	3	8
51-55	5	5	5	15
56-60	5	3	3	11
<b>TOTAL</b>	<b>11</b>	<b>15</b>	<b>14</b>	<b>40</b>

**TEACHER BOARD DISABILITY DETERMINATIONS**

<b>TEACHER BOARD DISABILITY APPLICATIONS SUBMITTED BY DISABILITY TYPE</b>				
	<b>Mar. 2002</b>	<b>April 2002</b>	<b>May 2002</b>	<b>Total</b>
<b><u>Disability Type</u></b>				
<b>Cancer</b>	3	4	5	12
<b>Cardiovascular</b>	0	1	0	1
<b>Diabetes</b>	1	0	1	2
<b>Eye Disorders</b>	0	1	0	1
<b>Mental Illness</b>	3	6	3	12
<b>Multiple Medical Problems</b>	2	0	1	3
<b>Muscle/Tissue</b>	1	0	0	1
<b>Neurology</b>	1	2	0	3
<b>Other</b>	0	1	0	1
<b>Orthopedic</b>	0	0	2	2
<b>Respiratory</b>	0	0	1	1
<b>Unknown</b>	0	0	1	1
<b>TOTAL</b>	11	15	14	40

**WISCONSIN RETIREMENT BOARD DISABILITY DETERMINATIONS**

<b>WI RETIREMENT BOARD DISABILITY DETERMINATIONS</b>				
<b><u>Type of Determination</u></b>	<b>Mar. 2002</b>	<b>April 2002</b>	<b>May 2002</b>	<b>Total</b>
Cancelled	0	0	1	1
Deemed Approved	1	0	0	1
Denial	1	2	0	3
Denial Rescinded: Approved	1	0	0	1
Termed	0	0	2	2
Withdrawn	1	2	2	5

<b>WI RETIREMENT BOARD DISABILITY ANNUITIES STARTED BY OPTION SELECTED</b>				
<b><u>Option</u></b>	<b>Mar. 2002</b>	<b>April 2002</b>	<b>May 2002</b>	<b>Total</b>
12 100% Continued to Named Survivor (Jt. Survivor) with 180 Payments Guaranteed	7	6	8	21
17 Prior to 1/1/82 with Spouse or Minor/Dependent Child	1	1	3	5
24 For Annuitant's Life Only	2	4	3	9
25 Life Annuity with 180 Payments Guaranteed	5	6	4	15
26 75% Continued to Named Survivor (Jt. Survivor)	1	2	2	5
27 100% Continued to Named Survivor (Jt. Survivor)	2	0	5	7
28 75% Continued to Annuitant or Named Survivor (Jt. Survivor) Upon Death of Either	1	0	1	2
<b>TOTAL</b>	19	19	26	64

<b>WI RETIREMENT BOARD DISABILITY ANNUITIES STARTED BY GENDER</b>				
	<b>Mar. 2002</b>	<b>April 2002</b>	<b>May 2002</b>	<b>Total</b>
<b><u>40.63 Disability Benefits by Gender</u></b>				
Females	13	11	13	37
Males	6	8	13	27
<b>TOTAL</b>	19	19	26	64

<b>WI RETIREMENT BOARD DISABILITY APPLICATIONS SUBMITTED BY AGE</b>				
	<b>Mar. 2002</b>	<b>April 2002</b>	<b>May 2002</b>	<b>Total</b>
<b><u>40.63 Disability Benefits by Age</u></b>				
31-35	0	0	1	1
36-40	2	0	1	3
41-45	0	3	4	7
46-50	4	3	6	13
51-55	9	5	4	18
56-60	2	8	2	12
61-65	1	3	2	6
<b>TOTAL</b>	18	22	20	60

**WISCONSIN RETIREMENT BOARD DISABILITY DETERMINATIONS**

<b>WI RETIREMENT BOARD DISABILITY APPLICATIONS SUBMITTED BY DISABILITY TYPE</b>				
	<b>Mar. 2002</b>	<b>April 2002</b>	<b>May 2002</b>	<b>Total</b>
<b><u>Disability Type</u></b>				
<b>Cancer</b>	2	2	4	8
<b>Diabetes</b>	0	1	1	2
<b>Hearing Disorders</b>	1	0	0	1
<b>Mental Illness</b>	4	1	2	7
<b>Multiple Medical Problems</b>	3	3	7	13
<b>Multiple Sclerosis</b>	1	0	2	3
<b>Muscle/Tissue</b>	1	2	2	5
<b>Nephrology</b>	1	0	0	1
<b>Neurology</b>	1	1	0	2
<b>Orthopedic</b>	4	5	2	11
<b>Other</b>	0	3	0	3
<b>Respiratory</b>	0	3	0	3
<b>Unknown</b>	0	1	0	1
<b>TOTAL</b>	18	22	20	60